



**Post 16-19
Bursary Policy
for Academic Year
18/19**

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Background & Legislation

The Educational Skill & Funding Agency (ESFA) dictates that the 16 to 19 Bursary Fund is a provision of financial support to help students overcome specific barriers to participation so they can remain in education.

There are primarily 2 types of 16 to 19 bursaries:

- a vulnerable bursary of **up to £1,200** a year for young people in one of the defined vulnerable groups
- Discretionary bursaries which institutions award to meet individual needs, for example, help with the cost of transport, meals, books and equipment.

All Educational Institutions are responsible for managing both types of bursary. Students who want to apply for support from the bursary fund should make an application. Each educational institution can set its own eligibility criteria for the discretionary bursaries and the terms and conditions under which it is awarded.

Funding

The Discretionary funding allocations for all Post 16 - 19 institutions in Outwood Grange Academies Trust are detailed below.

Vulnerable bursary funding is paid on an individual basis via application through the Student Bursary Support Service (SBSS) portal.

The calculation used by the ESFA is Learners in receipt of £30 per week Education Maintenance Allowance (EMA) in 2009/10 as a baseline % of 2010/11 funded student numbers. The % is then multiplied by 2018/19 allocated numbers and by a funding rate of £298 per learner.

Outwood Grange Academies Trust Post 16 - 19 Institutions	Funding Allocation 18/19 £
Outwood Academy Adwick	14,748
Outwood Academy Danum	16,461
Outwood Academy Easingwold	4,768
Outwood Academy Hemsworth	22,721
Outwood Academy Newbold	8,354
Outwood Academy Portland	16,736
Outwood Academy Ripon	8,046
Outwood Academy Valley	29,654
Outwood Grange Academy	25,684
Total	147,172

Administration

- The ESFA pay Discretionary funding in two parts: 2/3 in September and 1/3 in April
- Each Academy is permitted to retain 5% of their discretionary allocation towards the cost of administration.
- It is recommended that each Academy retains a % of their initial funding receipt for 'in-year applications'

I. Post 16 -19 Bursary – A Summary

To be eligible for either type of bursary students must:

- be aged over 16 and under 19 at 31 August 2018
- be aged 19 or over and have an Education, Health and Care Plan (EHCP) due to their high needs
- be aged 19 or over 31 August 2017 and continuing on an study programme they began aged 16 to 18 ('19+ continuers')
- meet the residency criteria in ESFA 2018 to 2019 academic year funding regulations for post-16 provision
- be participating in provision that is subject to inspection by a public body which assures quality (such as Ofsted), the provision must also be either
 - funded directly by EFA or by EFA via a local authority
 - otherwise publicly funded and lead to a qualification (up to and including Level 3) accredited by Ofqual or pursuant to Section 96 or the Learning and Skills Act 2000
 - a 16 to 19 traineeship programme

To be eligible for the **vulnerable bursary**, students must be in **one** of the defined vulnerable groups:

- in care
- care leavers
- in receipt of Income Support, or Universal Credit in place of Income Support, in their own right
- in receipt of Employment and Support Allowance or Universal Credit and Disability Living or Personal Independence Payments in their own right.

Post 16 Centres can draw down funding (by submitting a funding claim) for vulnerable bursaries from the Student Bursary Support Service (SBSS) when they have identified students who meet the vulnerable bursary criteria.

To be eligible for the **discretionary bursary**, students must be facing financial barriers to participation and need help to stay in education.

Discretionary Bursary funding is allocated to each individual educational institution by the ESFA annually who manage within legislation guidelines and its own policy terms. All Post 16 – 19 centres in Outwood Grange Academies Trust have the same eligibility criteria and all centres in the Trust will follow this policy.

The 16-19 Bursary is designed to help support those people who 'face the greatest barriers to continuing in education and training post 16. Applications can be made throughout the academic year as students' financial or personal circumstances change.

II. Eligibility criteria: all bursaries

This section covers the basic eligibility requirements of the scheme (which mirrors eligibility for publicly funded 16 to 19 education and training). These criteria apply to both types of bursary – discretionary and vulnerable – unless otherwise noted.

Age

To be eligible to receive a bursary in the 2018 to 2019 academic year the student must be aged 16 or over but under 19 at 31 August 2018.

Students aged 19 or over are only eligible to receive a discretionary bursary if they:

- are continuing on a study programme they began aged 16 to 18 (19+ continuers) or
- have an Education, Health and Care Plan (EHCP)

These 2 groups of students can receive a discretionary bursary while they continue to attend education (in the case of a 19+ continuer, this must be the same programme they started before they turned 19), as long as their eligibility continues and the academy considers they need the additional support to continue their participation.

Students aged 19 and over at 31 August 2018 in the 2018 to 2019 academic year

Students who are aged 19 and over on 31 August 2018 are not eligible for support from the 16 to 19 Bursary Fund unless they:

- have an Education, Health and Care Plan (EHCP) and are attending eligible education provision; or
- are a 19+ continuer, in other words, a student who is continuing on an eligible study programme they began aged 16 to 18

Other students aged 19 and over may be able to access adult Discretionary Learner Support. Students should talk to Post 16 staff to establish what help may be available to them.

Students aged 19 or over are **not eligible** for the **vulnerable** student bursary.

Residency

Students must meet the residency criteria in ESFA funding regulation. For funding purposes, the eligibility of the student must be established. A student must have the legal right to be resident in the United Kingdom at the start of their study programme. Any person subject to a Home Office deportation order will ordinarily be ineligible for funding until their situation has been resolved to the satisfaction of the Home Office, as institutions must only claim funding for students who can complete their programmes.

If any difficulties arise in establishing student eligibility a referral needs to be made to the ESFA.

Asylum Seeking Children

- Accompanied, under 18 with an adult relative or partner are not eligible to apply for any Bursary funding, but provisions in kind for books, equipment and travel passes can be given. No cash payments can be made. All other assistance requirements can be made via an application to the Home Office.
 - It is important to note that eligibility only applies if their application for asylum has not been refused
- Unaccompanied, to age 17 – are funded as ‘Looked after Children’ and are eligible for vulnerable bursary. At age 18 their immigration status must be considered. Successful asylum claims will be eligible to continue with the vulnerable bursary until the upper age limit. Unsuccessful claims have no further entitlement to funding unless there is a breach of human rights established.

Young offenders

Young offenders can apply for a bursary if they:

- are serving a non-custodial sentence
- have been released early from a custodial sentence (except on temporary license)
- have been remanded to a non-secure institution

Young offenders cannot apply for a bursary if they:

- are serving a custodial sentence
- have been released from a custodial sentence on temporary license
- have been remanded to a secure institution

Academy staff must provide in-kind support to young offenders rather than cash wherever possible.

Vulnerable Bursaries

Students who are in one or more of the groups below can apply for a vulnerable bursary of **up to £1,200** (if they are participating on a study programme that lasts for 30 weeks or more). If they are studying for less than 30 weeks, the bursary will be paid on a pro-rata basis. This reflects that students in these groups may need a greater level of support to enable them to continue to participate.

The defined vulnerable groups are students who are:

- in care
- care leavers
- receiving Income Support (IS); or Universal Credit (UC) in place of Income Support, in their own right because they are financially supporting themselves and a dependant (e.g. child or partner)
- receiving Disability Living Allowance (DLA) or Personal Independence Payments in their own right as well as Employment and Support Allowance (ESA) or Universal Credit (UC).

Students do not need to live independently of their parents to be eligible for a vulnerable student payment - they can claim ESA or UC in their own right while living in the parental home.

Nb. If a student has been awarded UC for housing costs (ie in place of housing benefit), there is no eligibility to a vulnerable bursary unless they are also in receipt of another benefit.

Each Post 16 centre is responsible for assessing if students are eligible to receive a vulnerable bursary payment and for retaining evidence to support the decision. The vulnerable bursary can be paid for each academic year the student is in education or training, as long as they continue to meet the scheme eligibility criteria.

Post 16 centres can pay a vulnerable student more than £1,200 if they assess they need extra help to remain in education. Any payments over the £1,200 must be paid from their discretionary bursary allocation.

Equally, The Post 16 centre may decide that although a young person may be eligible for a vulnerable bursary because they are in one or more of the defined vulnerable groups, they do not have any actual financial need and so are not eligible on that basis. For example, their financial needs are already met and/or they have no relevant costs.

For students that are eligible, an immediate pro rata payment in-kind will be made at the point of award. Thereafter students will be paid following each Praising Stars© Cycle if they have met the conditions in the 16-19 Bursary Contract.

Defining in care and care leavers

The 16 to 19 Bursary Fund defines 'in care' as:

- children looked after by a local authority on a voluntary basis (section 20 of the Children Act 1989) or under a care order (section 31 of the Children Act 1989) - Section 22 of the Children Act 1989 defines the term 'looked after child'

A 'care leaver' is defined as:

- a young person aged 16 and 17 who was previously looked after for a period of 13 weeks consecutively (or periods amounting to 13 weeks), which began after the age of 14 and ended after the age of 16; or
- a young person aged 18 or above who was looked after prior to becoming 18 for a period of 13 weeks consecutively (or periods of 13 weeks), which began after the age of 14 and ended after the age of 16.

In legal terms these children are called 'relevant children' or 'former relevant children'.

Foster Care

A young person placed with a foster carer by either the local authority or on the books of an independent fostering agency is classed as 'looked after', and therefore defined as 'in care' so is eligible for the vulnerable bursary.

A young person who is privately fostered (i.e. a private arrangement between the parent and the person who will care for the child) is not classed as 'looked after', and therefore is not eligible for the vulnerable bursary.

A young person who has been in the care of the local authority and the care transferred to another party via a permanent form of fostering (e.g. Special Guardianship Order) is defined as having left care and so is therefore a 'care leaver', and is eligible for the vulnerable bursary.

Discretionary Bursary

It is the decision of each Post 16-19 centre to award a Discretionary Bursary based on each student's individual circumstances. It is essential that the funding reaches those students who are in most need of financial support. Additionally, the renew process must comply with the Equality Act 2010.

From September 2018, the eligibility criteria to **make an application** for a discretionary bursary are:

- A student currently entitled to Free School Meals, or
- A student who has claimed Free School Meals in the last 6 years, or
- A student whose parent(s) are currently claiming other means-tested benefits, but are not entitled to free school meals, or
- A student with a household income of less than £25,000 per annum
- At the decision of the principal, any student who does not fall under the categories listed above, but consider themselves to be in financial hardship.

Further information about making an application for Free School Meals can be found on www.Gov.uk website (<https://www.gov.uk/apply-free-school-meals>).

Discretionary bursary award can be used for the following examples, i.e. an expense which directly relates to supporting educational attendance and/or study:

- Books/equipment
- Additional costs – relating to education
- Transport
- Meals
- Accommodation (including whether this was returned to the academy once in receipt of benefits)
- DBS checks for students as required for work placements/course requirement
- Course related trips
- UCAS/open day costs
- ICT Software of Licencing as appropriate to assist study
- Exam resit fees
- Sports activities (where they directly relate to a course)
- Professional membership fees
- Other – by prior agreement

An appeals panel will sit to consider the case of any student who wishes to challenge the decision not to award a bursary and any complaints must be processed through the Academy Complaints Procedures.

Bursary refunds/payments can only be made directly to the student. All students must have their own bank account to receive an award and all payments made directly to the student will be made via BACS whether it is a standalone payment or a regular instalment.

Where there are exceptional circumstances in a student being deemed unable to administer their own account. Arrangements need to be discussed in advance with the Principal.

All students who receive a successful application for either bursary are entitled to a school free meal. The ESFA funding rate is £2.41 per day. This is paid from the discretionary bursary.

Allocation of the meal funding is made daily on the cashless catering system, and any unused allocation will remain in the Bursary fund. There is no rollover to the next school day.

Other Student Support Schemes

Students receiving support from a 16-19 Bursary Fund can also receive help from other ESFA funded student support Schemes. 'Care to Learn' can provide help with the costs of children for young parents whilst they are in education. **It is important that each Post 16 centre identifies any student who may fall into this criteria.**

Applications for this funding is via the SSBS Portal.

III. The Application Process – 2018/19

Information for students regarding the Outwood Grange Academies Trust 16-19 Bursary Fund will 'go live' on each Academy's website on GCSE results day. Students who believe they meet the criteria to make an application will be able to either download an application form, collect one during Subject Market, or from the Post 16 Team.

Students can submit an application at any point during the academic year as their financial/home situation dictates but payments will not be back-dated. However, their application will be subject to a review of their attendance and performance during the current Praising Stars© cycle. As is Academy policy a student starts a 'clean slate' at the start of each Praising Stars© cycle and a bursary instalment will be paid subject to them meeting the terms and conditions in the 16-19 Bursary Contract in that half term.

Before an application will be considered the completed and signed application form and all supporting documentation must be submitted to the Post 16 Team who will take a copy of the documentation for retention on file and sign to verify authenticity. In the case of an application on the eligibility of free school meals, it is essential that Students/parents have already submitted an application to the Local Authority and been awarded Free School Meals before they submit their application; each academy can have this verified by the LA as a means of assessing household income.

However, it is important to make parents aware that under current legislation, the receipt of bursary funding does not affect receipt other means-tested benefits paid to families, such as Income Support, Jobseeker's Allowance, Child Benefit, Working Tax Credit and Housing Benefit.

If, however, the student is in receipt of Disability Living Allowance (or Personal Independence Payments) and Employment support Allowance or in receipt of Universal Credit, parents can no longer receive certain household/family benefits for that child, such as child benefit.

The Post 16 team will review each application and where necessary refer to the Finance Manager for further guidance. Following this a recommendation will be made regarding each application.

If a student's application is validated, the Finance Department will then set up a BACS payment facility for the successful applicant.

Vulnerable bursary funding allocations are paid to students in half termly instalments. For students that are eligible, an immediate pro rata payment * in-kind will be made at the point of award. Thereafter students will be paid each half term/following each Praising Stars© Cycle if they have met the conditions in the 16-19 Bursary Contract. Support for all students about how to manage money will be provided through the Guidance Programme.

*Pro-rata payments are calculated in accordance with either programme weeks or daily rate

Discretionary bursary funding will be allocated/paid by any/several of the following means:

- In lieu of receipts received and authorised by the Post 16 leader
- In-kind allocation for items /services – e.g. elements of travel, exam fees paid directly by the Post 16 centre
- Allocation to the catering system for Free Meals.

All Bursary funding is by means of central Government public funding and as such parents/students are expected to make the Post 16 team aware of any change in financial/home situation as they arise. Parents/ students are required to sign to this effect in the Bursary Contract and if upon review it is found that individuals have falsified documents, submitted inaccurate information or been claiming money fraudulently the Academy is legally obliged to refer the matter to the police and seek to recover funds already paid.

The application process is supported by the 'Appeals Process' and the 'Academy Complaints Procedures'.

III.i The Appeals Process

All students have the right to appeal the decision and must submit a letter to the Principal within two-weeks of receiving their decision letter. All decisions regarding appeals will be communicated within a week of the Appeals Panel meeting and this decision is final. However, this should not stop a student submitting a further application should they feel they have sufficient change in circumstances.

III.ii Academy Complaints Procedures

Should a student/parent wish to make a formal complaint regarding the 16-19 Bursary Application and Decision Process they should follow the Academy Complaints Procedure.

IV Application of the 16-19 Bursary Funding

Each Academy will retain a proportion of their allocation following each instalment from the EFSA to support any applications made during the remainder of the academic year. The Bursary Contract clearly states that there 'is an expectation that a student will spend their Bursary to support their education and this could cover such outgoings such as transport costs, books and equipment, trips and other course related costs. Students may require the money to pay for food but for those in receipt of Free School Meals this in itself will be the support under that category.

V 16-19 Bursary Contract

All students in receipt of funding must sign a 16-19 Bursary Contract, which states the conditions under which the Academy will issue the funding. Students must:

- Attend all timetabled lessons, sessions or activities as agreed in their Learning Contract.
- Achieve at least E3 in all subjects at each Praising Stars©.
- Have no concerns raised during each Praising Stars© cycle.
- Meet Academy targets for attendance with no unauthorised absence.

Following a review at each Praising Stars© should a student fail to meet the conditions of their Bursary contract their payment will be prorata'd accordingly. Where a student fails to meet one of the conditions of the contract they will lose a week's payment. A tariff for this is outlined below:

Condition of contract	Point to consider	Tariff applied
Have no behaviour concerns during each Praising Stars© cycle.	A student may have multiple behaviour concerns during Praising Stars© or just one so it is important to tariff this.	Each Concern form received will result in a prorata'd bursary payment. The deduction of £30 per Concern form equates to one week's payment.
Attend all timetabled lessons, sessions or activities as agreed in their Learning Contract.	Attendance concerns will be measured against the Academy target. However, it is important to measure attendance for the Praising Stars© cycle to avoid students being penalised unfairly when they have improved their attendance.	Attendance below academy target for the Praising Stars© cycle will equate to a prorata'd payment with a deduction of £30.
Achieve at least E3 in all subjects at each Praising Stars©.	Each subject that is below an E3 will result in a prorata'd payment.	Students will lose £30 for each subject that is below E3 on the Praising Stars© cycle.
Meet Academy targets for attendance with no unauthorised absence.	See point 2.	

Any student failing to meet one or more conditions of the contract will be invited by the Post 16 team to discuss any circumstances/difficulties. Any additional individual requirements can then be considered prior to any deductions being made.

VI Data

Each academy must record and track data on each student who submits an application to support ESFA audit requirements.

All students will be allocated their bursary based on their low household income, but for auditing purposes students are required to identify why they require the bursary (e.g. materials, resources, exam resit etc.) as well as their ethnicity and gender. The application forms must be stored in a lockable cabinet/cupboard which is fire proof to keep data safe. The data will be retained and disposed of in line with the Trust's data retention policy and GDPR policy.

Post 6-19 Bursary ~ Guidance for Students

In order to ascertain whether you are eligible for a 16-19 Bursary you should follow the guidance below.

‘Vulnerable Bursary’

If the answer to any of these questions is ‘YES’ you are **eligible to apply** to receive a 16-19 Bursary of up to £1,200 per annum

Are you:

- in care, including Foster Care
- care leavers
- getting Income Support (IS), or Universal Credit (UC) in place of Income Support, in their own right
- getting Employment and Support Allowance (ESA) or Universal Credit (UC) and Disability Living Allowance (DLA) or Personal Independence Payments in their own right

See Application Form for details of documentation you will need to submit to verify your eligibility.

‘Discretionary Bursary’

If the answer to any of these questions is ‘YES’ you are **eligible to apply** for a ‘Discretionary Bursary’.

Are you a student who:

- is currently entitled to Free School Meals, or
- has claimed Free School Meals in the last 6 years, or
- has parents that are currently claiming other means-tested benefits, but are not entitled to free school meals, or
- A student with a household income of less than £25,000 a year
- At the decision of the principal, any student who does not fall under the categories listed above, but consider themselves to be in financial hardship.

See Trust Bursary Policy for more information and verifying your eligibility.

Other important information to understand:

- You must be **under 19 on the 31st August** in the academic year you start your course to be eligible for a Bursary.
- If you **turn 19 during your programme of study** and are 'automatically eligible for the 'Discretionary Bursary' you will be supported until the end of the academic year or until your course ends whichever is the sooner.

VII: Information and Advice from the EFSA

FAQs

Who is eligible to apply for a bursary?

Students in the 'vulnerable' group (Automatically Eligible) can make an application and will be awarded bursary of up to £1200 each academic year (to be paid in instalments) once their documentation has been verified and a successful application has been made on the EFSA Students Bursary Support Service (SBSS), Students can apply for 'discretionary bursary' (Eligible to Apply) if they are:

- A student currently entitled to Free School Meals, or
- A student who has claimed Free School Meals in the last 6 years, or
- A student whose parents are currently claiming other means-tested benefits, but are not entitled to free school meals, or
- A student with a household income of less than £25,000 per annum
- At the decision of the principal, any student who does not fall under the categories listed above, but consider themselves to be in financial hardship.

Who is eligible for Free School Meals?

Students aged 16 or over but under 19 at 31 August 2017. Students aged 19 and over are only eligible if they :

- Are continuing on a study programme they began aged 16 to 18 ('19+ continuers), or
- Have an Education Health Care Plan (EHCP)

And Parents who are in receipt of:

- Income Support
- income-based Jobseeker's Allowance
- income-related Employment and Support Allowance (ESA)
- support under Part VI of the Immigration and Asylum Act 1999
- the guaranteed element of State Pension Credit
- Child Tax Credit (provided you're not also entitled to Working Tax Credit and have an annual gross income of no more than £16,190 as assessed by HMRC)
- Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit

Children who get paid these benefits directly, instead of through a parent or guardian, can also get free school meals.

What documents do I need to submit with my application?

If you are making an application under 'Automatically Eligible' because you are part of the 'vulnerable' category you will need to submit:

- A letter from the Local Authority confirming care or leaving care arrangements.
- Award notice for both Disability Allowance and Employment Support Allowance.
- Award notice for income support (paid to you not your parents) stating you are eligible to be in education
- Copy of student's Universal Credit or ESA award from the DWP *. Evidence of Disability Living Allowance or Personal Independence Payment if claimed.

If you are making an application under the 'Eligible to Apply' for a Discretionary Bursary you will need to have made a successful application to your Local Authority for Free School Meals. The Academy will verify this with the Local Authority and if you have a current application then we will consider your application. If you are not currently in receipt of Free School Meals, but are entitled to them, you will need to make this application before you can apply for a bursary.

All documents must be original and must be taken to the Post 16 team who will photocopy these documents and sign to verify their authenticity. All students are expected to make the Academy aware of any change in financial/home situation as they arise.

Parents/ students are required to sign to this effect in the Bursary Contract and if upon review it is found that individuals have falsified documents, submitted inaccurate information or been claiming money fraudulently the Academy will refer the matter to the police.

When can I put in an application?

Students can submit an application at any time during the academic year, but their application will be subject to a full review of attendance, behaviour and performance during the current Praising Stars© cycle.

How will I be paid my bursary?

All bursaries will be paid into the applicant's bank account. Monies will not be paid to a parent nor will cash payments be made. Payments will be processed following the Praising Stars© Cycle. The Bursary Contract clearly states that there 'is an expectation that a student will spend their Bursary to support their education and this could cover such outgoings such as transport costs, books and equipment, trips and other course related costs'.

Can my payment be stopped at any time?

Yes. The Bursary is subject to terms and conditions and if a student fails to meet these they will not receive payment in the following half term. The terms are linked to attendance, behaviour and performance in the Praising Stars© cycle. This could mean that if you are on the full award of £1200 you would have your half termly payment of £200 withdrawn. Please refer to the policy for more details.

I have not been successful in my application. What if I wish to appeal the decision?

You must write a letter to the Post 16 centre within two-weeks of receiving your decision letter. Then an appeals panel will meet and make a decision, which will then be communicated to you in writing. This decision is final and no further appeals on this application would be considered.

Who is the Appeals Panel made up of:

The appeal panel will consist of the following people:

- A member of the Senior Leadership Team within the Academy
- The Post 16 Learning Manager
- The Academy Finance or Business Manager
- A member of the Academy Council

I do not think I have been treated fairly. What can I do?

You will initially refer to the Post 16 Lead and inform them of your concerns. If you are still concerned and feel that you have not been treated fairly, please refer the matter to the Academy Principal. You would only follow the Trust complaints procedure once you have tried to resolve your concern as stated above.

Will my payments be back-dated?

Students can submit an application at any point during the academic year as their financial/home situation dictates but payments will not be back-dated.

Who is classed as a 'parent'?

A parent means an adult (parent/carer) named on the application form and income refers to 'parental income' not 'household income'.